

## How to get an official IRS Tax Return Transcript

Tax filers can request a transcript, free of charge, of their tax return from the IRS in one of three ways.

*(We strongly suggest that you have the transcript sent to yourself, then submit it to the FA Office so there is no question of whom it belongs i.e. a parent's tax transcript may list only the parents' name(s) which we may not be able to match to the corresponding student.)*

Request Method	Where	Tax Transcript Output Document			
		What?	How?	When	Direct to 3 <sup>rd</sup> Party?
Online	<a href="http://www.irs.gov">www.irs.gov</a>	Paper	Mailed	5-10 days	No
Telephone	(800)908-9946	Paper	Mailed	5-10 days	No
IRS Form 4506T-EZ	<a href="http://www.irs.gov/pub/irs-pdf/f4506tez.pdf">www.irs.gov/pub/irs-pdf/f4506tez.pdf</a>	Paper	Mailed	5-10 days	Yes

**NOTE: BE SURE TO REQUEST A TAX RETURN TRANSCRIPT. DO NOT REQUEST A TAX ACCOUNT TRANSCRIPT. TAX ACCOUNT TRANSCRIPTS WILL NOT BE ACCEPTED FOR FINANCIAL AID VERIFICATION.**

### **Online Request**

Available on the IRS Web site at [www.irs.gov](http://www.irs.gov)

1. In the **Online Services** section of the homepage click "Order a Tax Return or Account Transcript"
2. Click "Order a Transcript"
3. Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
4. Click "Continue"
5. In the **Type of Transcript** field, select "**Return Transcript**" and in the **Tax Year** field, select the appropriate year (i.e. 2012 taxes for 2013-14 FAFSA).
6. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
7. IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

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## **Telephone Request**

Available from the IRS by calling 1-800-908-9946

1. Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
2. Select "Option 2" to request an IRS Tax **Return** Transcript and then enter year requested.
3. If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
4. IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

## **Paper Request Form – IRS Form 4506T-EZ**

IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.

1. Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
2. Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
3. Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.
4. On line 6, enter tax year requested to receive IRS tax information for the tax year that is required for the corresponding academic year's FAFSA (i.e. 2012 taxes for 2013-14 FAFSA)
5. The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
6. Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
7. Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.
8. NOTE: Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.